

2024 Tax Organizer for Corporations Business Information

Business Information

Corporation's legal name		EIN	
Doing business as name			
In care of name			
Street address, city, state, and ZIP			
Email			
Phone number		Date of S corporation election	
Cell number		Date incorporated	
Fax number		State of incorporation	

Yes No

Does the corporation file under a calendar year?
 If "No," what is the tax year begin date? _____ Tax year end date? _____

Is this the corporations final year?

Did the corporation conduct business activities in any state other than the resident state?

If "Yes," what states? _____

What is the corporation's main business activity? _____

What product or service does the corporation provide? _____

What accounting method does the corporation use?

Cash Accrual Other (describe) _____

How many shareholders did the corporation have during the year? _____

Estimates

	Federal		Resident State		Resident City	
	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
Overpayment applied from 2023	_____	_____	_____	_____	_____	_____
First quarter	_____	_____	_____	_____	_____	_____
Second quarter	_____	_____	_____	_____	_____	_____
Third quarter	_____	_____	_____	_____	_____	_____
Fourth quarter	_____	_____	_____	_____	_____	_____
Additional payments	_____	_____	_____	_____	_____	_____

Account Information for Deposits and Withdrawals

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account		Use This Account for	
			Checking	Savings	Deposits	Withdrawals

Shareholder and Officer Information

Corporation Name:

EIN:



Shareholder or Officer Name Address City, State, and ZIP	ID Number	Title	Shares at Start of Year	Percentage of Ownership and Participation				Officer Compensation
				Total	Common	Preferred	Time	

Asset Listing for 2024

Corporation Name: _____

EIN: _____

Assets for:

Description of Property	Date Acquired	Cost / Basis	Date Disposed of	Sales Price	Expense of Sale

Sale of Stock, Real Estate, or Other Property

Corporation Name:

EIN:

Sale of Capital Assets (including items not reported on Form 1099-B)

Provide all brokerage statements

Table with 5 columns: Description of Property, Date Purchased, Date Sold, Sales Price, Cost. Multiple rows for data entry.

Installment Sale Income

Description of property:

Date acquired Date sold 2024 Prior Years

Table for installment sale income with rows for Selling price, Mortgages assumed, Cost of property sold, Depreciation allowed, Commissions and expense of sale, Gross profit percentage, Interest received, and Principal payments received.

Property was sold to a related party []